

## QuickBooks® Business Accounting Software 2009 for Windows®

### Mountain America CU – Direct setup Instructions



As [Mountain America Credit Union](#) completes its system conversion to [Mountain America CU – Direct service for QuickBooks users](#), you will need to modify your QuickBooks settings to ensure the smooth transition of your data. You will need your customer ID and PIN (Online Branch Password) for [Mountain America Credit Union](#). **This update is time sensitive and must be completed by December 31, 2010.**

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your PFM software services may stop functioning properly. This conversion should take about 10-20 minutes to complete.

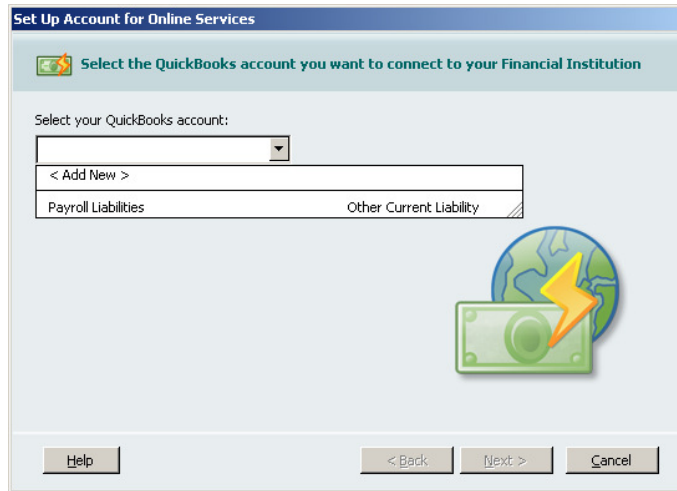
#### A. **BACK UP YOUR CURRENT DATA (All members)**

1. Choose the **File** menu → **Back Up**.
2. Specify which file to back up and where you want the backup saved in the QuickBooks Backup dialog, and then click **OK**. **Note** – it is recommended to save this file to your desktop.

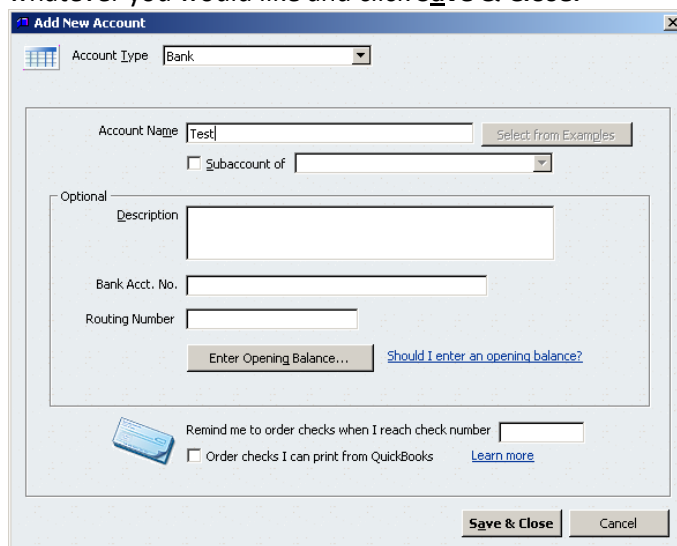
#### B. **ENABLE Mountain America CU – Direct ACCOUNTS (ALL CUSTOMERS)**

***\*Important!!! For Business Banking members utilizing the business.macu.com site – you will need to contact Mountain America Credit Union at 800.748.4302 or 801.325.6228, option 3 then option 2 to obtain an Online Branch password before continuing!***

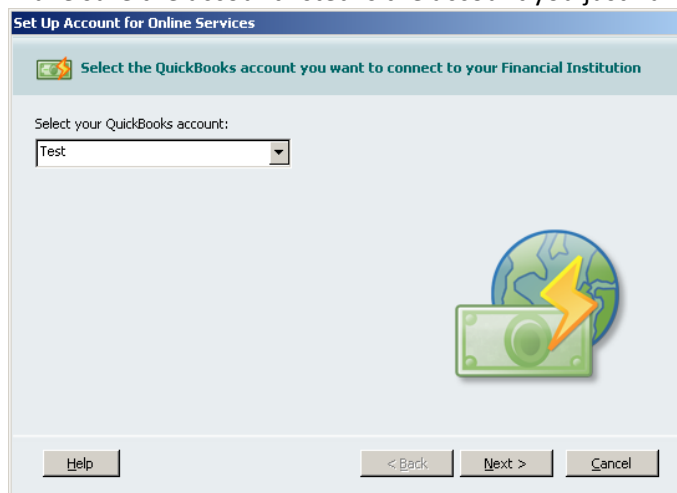
1. Choose **Banking** menu → **Online Banking** → **Setup Account for Online Services**.
2. Select 'Add New'



3. In the following box, make sure the Account Type is **Bank**. Then name your account whatever you would like and click **Save & Close**.



4. Make sure the account listed is the account you just named.



5. Click **Next** to proceed.

- Start typing in Mountain America Credit Union and select the **Mountain America CU – Direct** option and click **Next** to continue. **If Mountain America CU – Direct does not appear, follow the instructions found [here](#).**

Set Up Account for Online Services for Test

Select the Financial Institution for this account

QuickBooks Account: Test

Enter the name of your Financial Institution:

Mountain America CU - Direct

Mountain America C.U.

Mountain America Credit Union QBO

Mountain America CU - Direct

What if my Financial Institution is not listed?

[Tell me about online banking.](#)

Help < Back Next > Cancel

- If you are already signed up for the Online Branch, whether Consumer or Business, take the pre-selected option and click **Next**.
- If you are not registered for Online Banking, please contact us at 800.748.4302 or 801.325.6228 and choose option 3 followed by option 2 and speak with an Online Banking Representative.
- Complete the remaining prompts entering your account information, which is simply your Online Banking account number and password. Click on **Sign In**.

Set Up Account for Online Services for Export

Sign in to Mountain America CU - Direct

Customer ID  Use your Account Number

Password  Use your Password

Confirm Password

Need a Customer ID and Password?

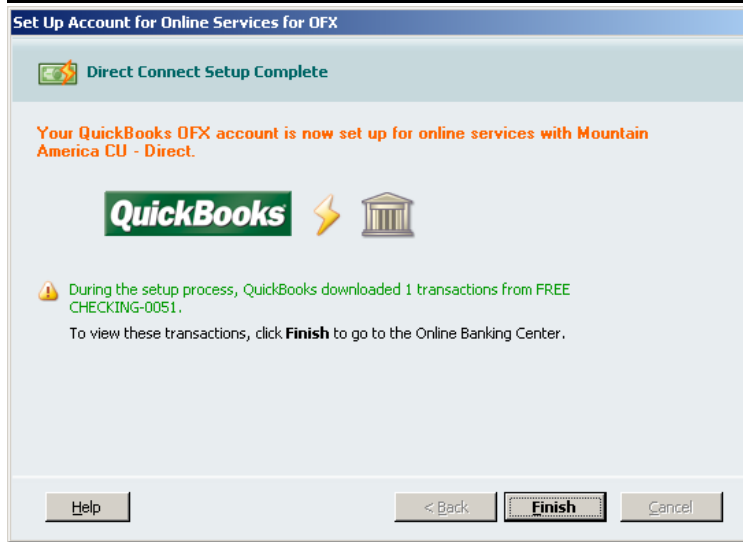
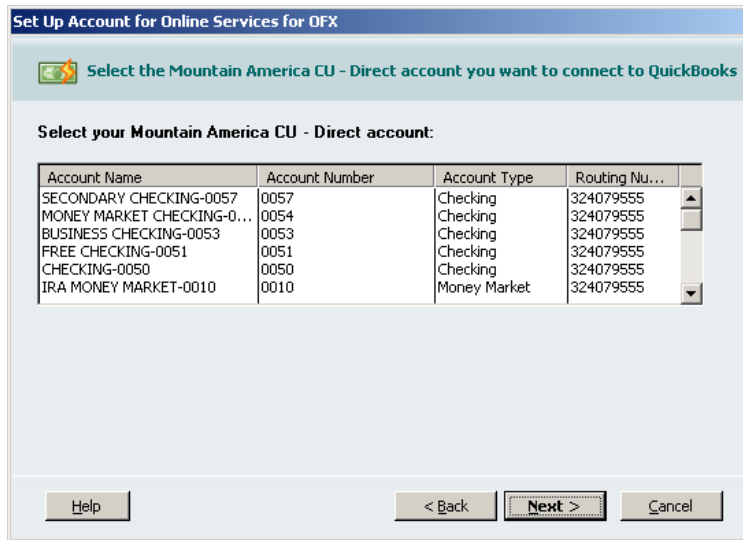
- Your QuickBooks login is the same as the login to your Mountain America CU - Direct Web site.
- Mountain America CU - Direct Support
- 1-800-748-4302 to sign up

Bank fees usually apply [Explain](#)

To sign in to your bank with a secure Internet connection, select **Sign In**.

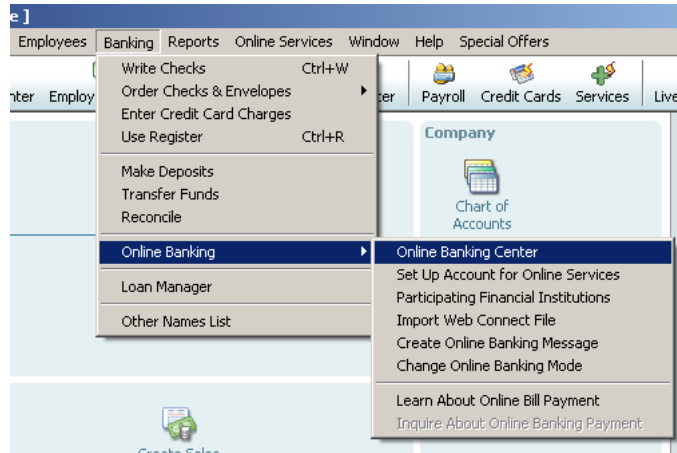
Help < Back Sign In Cancel

- Next you will select the account which you wish to add to QuickBooks. **Note** – you will need to repeat steps 1 through 9 for each additional account you wish to add.



C. **CONNECT & DOWNLOAD FIRST Mountain America CU – Direct STATEMENT (ALL MEMBERS)**

1. To download your new QuickStatement: Choose **Banking** menu → **Online Banking** → **Online Banking Center**.



2. In the Online Banking Center, select your new **Mountain America CU – Direct** account in the Financial Institution field.
3. Click **Receive Transactions**.
4. Make sure to enter your Online Branch password and click **OK**.
5. Review any transactions listed in the transaction summary as you normally would.

**THANK YOU FOR CHOOSING MOUNTAIN AMERICA CU – DIRECT FOR YOUR PERSONAL FINANCE SOFTWARE NEEDS!**

Additionally, you may also contact us at 800.748.4302 or 801.325.6228 option 3 then option 2. An Online Banking Representative will be available to assist you from 8:00 am to 6:00 pm Monday – Friday. You may also visit the [Mountain America Credit Union](https://www.macu.com) website at <https://www.macu.com> or <https://business.macu.com> or refer to <http://www.quickbooks.com/support>.